WEALTHTIME©

Client Online Registration Form

This Form should only be completed if you have not already signed the Online Registration Declaration in the Wealthtime Private Client Service Application Form.

A client may nominate a third party to view data. Where a nominee is appointed, the nominee should complete this form with their details and both the nominee and client should sign the form.

This Form will enable Wealthtime to set up the Online Access. Once signed and completed please return to Wealthtime.

1 Client Personal Details

Title

Mr ☐ Mrs ☐ Ms ☐ Miss ☐

Other ☐ If 'Other' please state

Forename(s)

Surname

Date of birth

Address

Postcode

Telephone number

Client Number

2 Online Service *User Memorable Information

Security information must be provided to enable us to verify users. You will need to **remember** this information as we will ask you about it when you first log in. Please use a maximum of 20 characters, and avoid the use of punctuation, for all the information below. Please note **all** 5 of the Memorable Information items listed below need to be completed and remembered **exactly** as entered below.

* This is either the client or the nominee.

Mother's maiden name

Please note: When entering your memorable date, the year should be between 01/01/1900 and 31/12/2100.

Memorable date DD/MM/YYYY

Place of birth

Memorable school

Memorable place

3 Wealthtime Online Services Terms and Conditions

Below are the Terms and Conditions that all Wealthtime Online Users must agree to before access will be granted.

Please read them carefully and make sure you understand all items before signing the Online Registration Declaration.

General
- These Terms and Conditions apply to all/any of our online services or 'the service' for which you have registered or will register in the future by completion and submission of this Online Registration Form.
- From time to time we may notify you of and ask you to accept any additional Terms and Conditions online and/or by revisions to this document.

Security
- Access to Wealthtime's online services is controlled by each user having a unique user record or other security identification data or token.
- You are responsible for ensuring you protect your login details or other security identification information, or token, and to ensure this you must:
  - take reasonable steps to keep it secret
  - not share your login details with anyone
  - not allow anyone else to use it
  - never write it down without disguising it
  - not leave a PC unattended whilst logged onto the service
  - destroy or securely store any information printed off from the service.

Revoking Access
- Wealthtime reserves the right to revoke any client's and/or their nominee's online user access as we see fit.

Data Protection
- For each online session, we may gather information relating to the identity of the user, the time of use, and the way in which the user has navigated through our website and our online services. This information may be used for administrative or security purposes.
- The data held on our systems belongs to Wealthtime. Individual users who have registered are only authorised to view information on their own Wealthtime Private Client Service.
- If data is accessible by you that does not relate to your own Wealthtime Private Client Service, due to our error or yours, you have no authority to use it and must notify us immediately.

Additional Users
- Wealthtime in principle will grant separate user access to you/your nominee and also any of your representatives.
- Wealthtime will also grant access to other members of your Wealthtime Private Client Service (e.g. Family Members) should you so wish following completion of the Authority to Provide Information to Third Party Form.
- It is your responsibility to keep Wealthtime informed of any change to your representatives and any third party access rights.

Additional Access to other accounts

- If you also wish to view the products of other members of your Wealthtime Private Client Service (e.g. Family Members) then please ask the relevant parties to complete the Authority to Provide Information to Third Party Form. Please note in respect of minors this access will be automatically retracted when the minor reaches the age of 18 years, at which point they can sign the Authority to Provide Information to Third Party Form in their own right to allow you to continue your access to their information, if required.

Availability/Alteration of Service

- Availability of our online services depends on our own systems availability and normal internet availability. We will not accept liability for any consequences of unavailability of the system for any reason.
- We may amend, extend or withdraw any online service at any time.

Access Rules

- The information relating to your Wealthtime Private Client Service can only be accessed using your Online Access Number, Password and Pin Number.
- The service may have limited update facilities allowing the user to inform Wealthtime of changes. If any such changes are made to the data, Wealthtime will not accept responsibility for its accuracy.

Information Available

- The details available under your Wealthtime Private Client Service are for illustrative purposes only.
- The date when the information for your Wealthtime Private Client Service was last updated will be indicated where possible.

Errors and Omissions

- We will use reasonable endeavours to keep our records up to date at all times. However, there may be changes which we may not have been notified of by you or a third party. If you access a record, which you believe contains errors or omissions please tell us immediately.
- Wealthtime acts as a central collection point for investment information. We rely on third parties to get up-to-date information and are dependant on their efficiency and accuracy.
- We will not accept liability for any claims by you and/ or your appointed representative/nominee/adviser for damages or loss arising from an inaccurate record.

4 Online Registration Declaration

Email address for online service *user (mandatory)

I warrant that I am/my nominee is (where applicable) authorised to view the relevant data. I declare that I have read and accept the Wealthtime Online Services Terms and Conditions and that the Online Account will be activated.
* This is either the client or the nominee.

Client's signature

Date

If a nominee is being appointed please also complete and sign section 5.

5 Online Registration - Appointment of Nominee

I appoint the nominee below to view my data, receive information online including confidential information and to send secure messages, if applicable, which Wealthtime shall be entitled to assume are sent on my behalf and with my authority unless I notify Wealthtime otherwise.

I authorise Wealthtime to provide the Wealthtime Online Service to my nominee who makes this Online Registration application for the Wealthtime Online Service with me.

Please note that this nominee is only in respect of the Wealthtime Online access and correspondence will still be addressed to the underlying client.

Client's signature

Date

Nominee Declaration

I warrant that I am authorised to view the relevant data. I declare that I have read and accept the Wealthtime Online Services Terms and Conditions and that the Online Account will be activated.

I warrant I will bring to the attention of the client any and all information that requires a decision or action by the client and to convey such decisions or action to Wealthtime if appropriate.

Nominee's signature

Date

Name of Nominee

Address of Nominee

Postcode